

## Connected Office for **FINANCIAL SERVICES**

The financial services industry remains a critical component of our economy. Now, more than ever, information technology (IT) is a key enabler in delivering high-value financial advice to an increasingly more “connected” and demanding clientele.

For today’s financial services firm, any investment made in IT is primarily for the purpose of operating your line of business application along with accessing, collaborating and communicating data. As simple as it sounds, doing this effectively over the years has been challenging for many businesses, particularly professionals like you that leverage industry-specific financial services software.

The critical issue for the majority of financial services firms is the myriad of suppliers you interact with to manage the five major technologies: network/desktop, internet, copier/printer, telecom and the most important one, your industry-specific financial services applications.

Having a single point of contact to manage all your technology, including your financial services software, is the ideal solution.

### **There is A NEW WAY!**

- **Connected Office for Financial program - delivered 95% Remote – 100% Proactive;**
- **We service financial services firms just like yours across North America;**
- **Ensure your technology and data is in the hands of Accredited Professionals;**
- **Safeguard your client data for regulatory compliance.**

### **Our expertise in the FINANCIAL SERVICES industry!**

As a leading financial services firm, a strategic technology partner can provide you a competitive advantage in your market. As your single-source provider, The Utility Company will tailor a custom solution for your specific firm’s needs.

- No more calling your software vendor, only to be told that it is a network problem; or
- calling an IT provider that has no expertise with your financial services software!

### **1-866-My-Utility – Your ONE number to call.**

Our **Utility Certified Vendor Program** ensures that we are subject matter experts in the ongoing maintenance, support and general usability of leading financial services applications. Visit [www.theutilitycompany.com/certified](http://www.theutilitycompany.com/certified) to see if your line of business application is Utility Certified.

*“I couldn’t be more pleased with our decision to move to a more proactive IT solution. The Utility Company isn’t just here to react and fix our problems. They take a full solution approach to our entire business and look at how we use IT now, and how we should use it in the future. This is the IT solution I have been looking for!”*

*“From the customer’s perspective, we enjoy having one number to call for all our technology concerns, including our line of business application - ‘Fidelity Investments’. The Utility Certified Vendor Program provides us the peace of mind that Utility has taken the necessary steps to support our specific industry (financial services) and technology challenges.”*

**Jimmy Patton - Managing Partner & CEO**  
**Patton, Albertson Miller**  
**Macon, GA**

## Why should you consider The Utility Company?

The chart below details the advantages the Utility model has over either a break/fix IT service provider or an internal employee. In fact, we can usually save organizations **40-50%** on what they are currently spending while providing them with a **better, faster** and **greener** service! If you are interested in saving money and/or getting more from your existing technology, then there truly is **A NEW WAY!**

Evaluate your IT solution options with these questions:	Break/Fix Provider	Internal IT Resource	The Utility Company
<b>Cost &amp; Value of Reactive Support? (i.e. something breaks and you call for assistance)</b>	Pre-purchased blocks of time that you draw down on with usage at \$75-125 per hour - Generally a minimum 1 hour charge no matter how short the service call is.	An internal IT resource costs anywhere from \$30,000-\$100,000 annually (depending on location and expertise sought) and requires training, benefits, sick days, vacations, etc.	1-866-My-Utility live North-American helpdesk is available on a usage or fixed fee basis. The majority of issues can be resolved in 15 minutes or less with no minimum charge.
<b>Ability to Offer Proactive Support? (Remote Monitoring and Management)</b>	Usually not offered. May have the ability to offer simple monitoring alerts but their ability to respond is an issue.	May purchase simple monitoring tools and be alerted to issue but ability to respond is still a problem.	24x7 Proactive Monitoring and Management of all network infrastructure and devices is available to catch issues before they become problematic.
<b>Response Time - Is your Business a Priority?</b>	Can only respond to the current crisis at hand. Conflicting needs at multiple sites means putting one client's needs over another's.	Dedicated internal support but can be stretched thin. Again, must prioritize based on incoming requests.	Access to Helpdesk 8 am to 8 pm ET. 24x7x365 support available. Over 95% of issues resolved remotely.
<b>Expertise - Depth of Knowledge?</b>	Usually a 'one-person shop' therefore ongoing training, exposure and understanding of all areas of technology not possible.	Internal employees do gain expertise in your specific needs over time, but get limited exposure to all areas of technology and still require ongoing training.	Thousands of clients in a wide range of fields gives our certified team of technicians the experience to deal with any issue. Sharing of knowledge and ability to escalate to subject matter experts.
<b>Trustworthiness? Data Privacy? Regulatory Compliance?</b>	May come highly recommended or by flipping through the Yellow Pages (or Googling). 100% access to your confidential corporate data.	Reference checks before being handed the 'keys to your kingdom'. More power to damage an organization than anyone else if employee becomes disgruntled, is incompetent or leaves suddenly. Homegrown processes vs. industry-standard best practices.	Currently one of only 3 MSPAlliance™-accredited Network Operations Centers (NOCs) in North America. Advocate for professional (technical and ethical) designations for Managed Service Providers (MSPs) to ensure data privacy and regulatory compliance.
<b>Security of your Assets, Data, and Intellectual Property (IP)?</b>	Not usually offered or guaranteed. Sales of physical hardware (such as Exchange email servers) or manual tape back-up systems increases chance of failure/loss.	Generally rely on remembering to back up systems, burn DVDs and store copied data offsite. Very manual/physical process prone to errors.	Virtual solutions available such as Hosted Exchange and online data back-up means your critical corporate data is backed up daily and stored in a highly secure data center.
<b>Single Point of Contact or Single Point of Failure?</b>	Businesses deal with 4 or more suppliers or providers (on average) to fulfill their technology needs. This means more numbers to call and fingers pointed when trying to isolate who owns a problem. If its a direct IT problem, you are reliant on one individual to come.	Employee still has to call various suppliers to remedy any problems that aren't strictly internal (i.e. Internet Service Provider, Telephone Company, Web Host, etc.). Again, the availability of your internal resource can be an issue.	One number to call for all things technology-related. 95% of issues can be resolved remotely from our North American headquarters. Your local Utility Service Provider is also available for onsite work and to aid in your technology planning (as your Virtual CIO).
<b>Line of Business Application Support?</b>	Usually no direct knowledge on the specific applications you depend on daily to run your business.	Usually gains some direct knowledge on the specific applications due to repeated exposure.	1-866-My-Utility helpdesk technicians become Utility Certified on products important to your industry. They can also interact with software vendors on your behalf.
<b>Green IT Practices?</b>	Drive to your business every time there's a problem. Selling you more hardware and software means more environmental waste.	Drive into work, may implement programs to reduce inefficiencies and save energy internally. More devices to support means more job security though.	Besides virtualizing your hardware needs, Utility encourages the use of Software-as-a-Service (hosted access, no physical upgrades, shipping, etc.). Remote remediation means little need to come onsite. Automated system management can reduce day-to-day energy consumption.
<b>Role within your Company?</b>	Independent contractor who gets paid more when more things go wrong.	Employee who wants to have enough work to justify their role.	Trusted Business IT Advisor who wants you to utilize your existing technology more effectively to drive profits. Under our program, the less problems you have the more profitable we can all be.